



Where There's a wILL, There's a Way: Optimizing ILL Services in Texas Public Libraries

October 19, 2017

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Texas State Library and Archives Commission



Webinar Overview

1. Navigator ILL system overview

1. Value of ILL services

2. ILL & Texas Public Library usage statistics

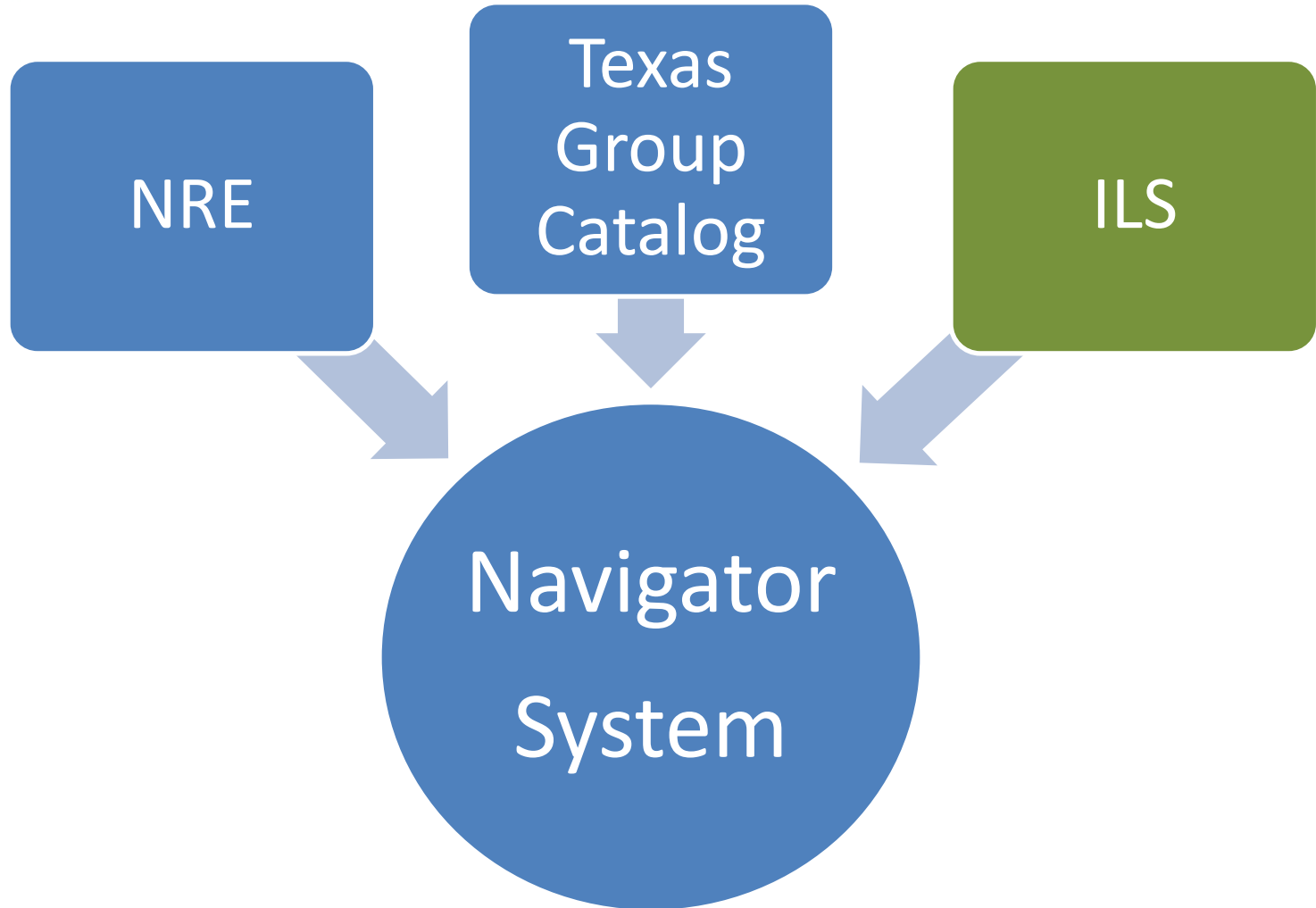
3. Texas Group Catalog and accurate data

4. Cost cutting recommendations for borrowing & lending

5. Ongoing training opportunities

6. Promote ILL service in your community

Navigator





Two Online Tools: Staff and Public

Use **NRE** to:

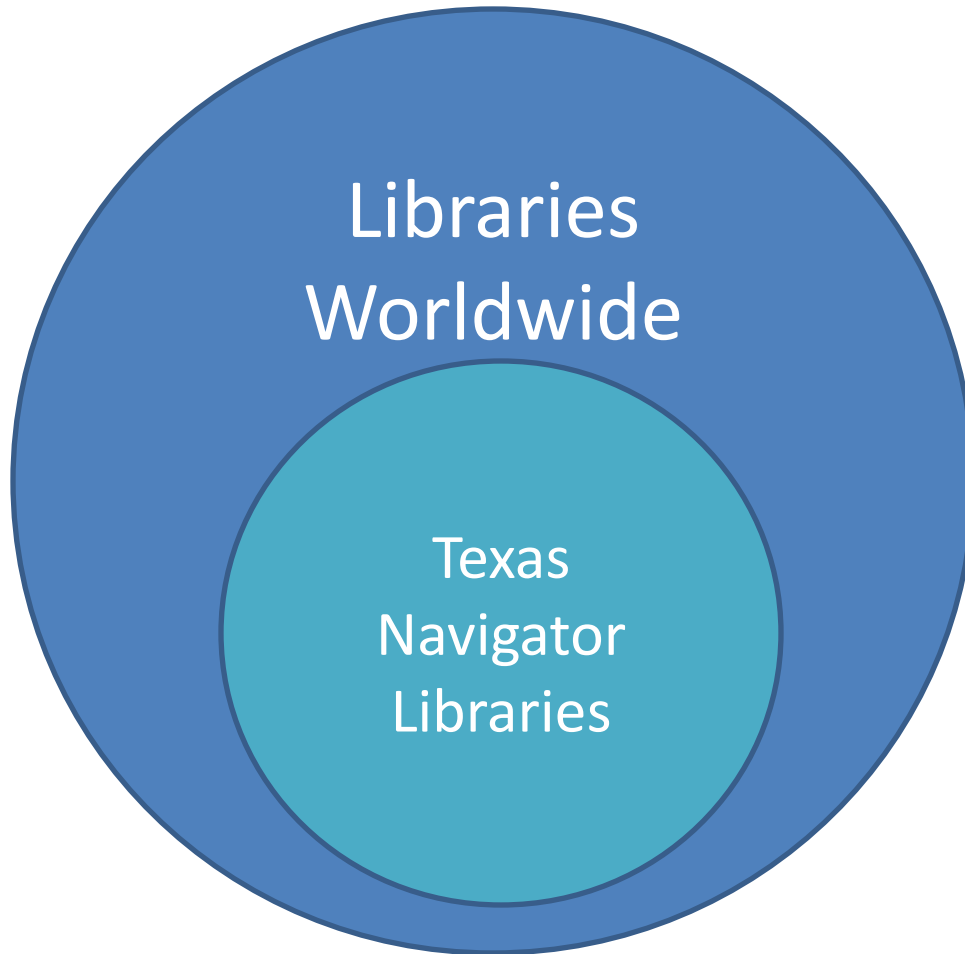
- Manage incoming requests from other libraries
- Place requests for items
- Add and manage patron accounts
- Run reports

Use **TX Group Catalog** to:

- Search Texas holdings
- Search holdings worldwide
- Place requests for items if allowable
- Find OCLC number for requesting in NRE



Interlibrary Loan Landscape





Value of ILL

No library can own every book.

Every reader his [or her] book

&

Every book its reader



Value of ILL

- Cost avoidance for library budget
- Shelving space at a premium
- Hard to find/unique resources
- Collection development policies



Value of ILL

- **Accreditation Criteria**

Texas Administrative Code, RULE §1.83:

(3) The library must offer to borrow materials via the interlibrary loan resource sharing service for persons residing in the library's designated service area. A library must also participate in the interlibrary loan resource sharing service by lending its materials to other libraries, as requested...



How many books do Texas patrons borrow through ILL?

- FY2015 : 225,307
- FY2016: 232,449
- FY2017: 244,320 items
~650 items per day



How many books do Texas Public Libraries lend through ILL?

- FY2015 : 139,723 items
 - FY2016: 156,005 items
 - FY2017: 162,822 items
- ~ 446 items per day

Usage By Library

NRE

[Search](#)
[Requests](#)
[Work Queue](#)
[User](#)
[Locations](#)
[Reports](#)
[Batch Reruns](#)
[Report a Problem](#)
[Logout](#)
[Help](#)
[OCLC Policy Directory](#)
[Texas Resource Sharing Project](#)

User ID
TEXASSU...

Reports

- ☒ Batch Reruns
- ☐ Daily ILL Statistics
- ☐ Incoming requests by requester
- ☐ Loan requested per title
- ☐ Loan requested per title - Not Supplied
- ☐ Loan supplied per title
- ☐ Monthly ILL Statistics
- ☒ OCLC Usage Statistics Web Site Account Details
- ☐ Outgoing requests by supplier
- ☐ Requesting Patron Emails
- ☐ User Barcode Prefix

Start Date  (e.g. 1 Apr 2007)

End Date  (e.g. 10 Jun 2007)

[Generate Report](#) [Reset Query](#)



Using Navigator ILL

- What now?

Self paced trainings and exercises:

https://www.tsl.texas.gov/texshare/newsletter/resourcesharingprojects/?page_id=2189

- Log into NRE
- Try it!

TEXAS Work Queue

- Search
- Requests
- Work Queue
- User
- Locations
- Reports
- Batch Reruns
- Report a Problem
- Logout
- Help
- OCLC Policy Directory
- Texas Resource Sharing Project

User ID
TEXASSU...

Borrower		Lender	
Category	Count	Category	Count
Idle	0	New Requests	5
Idle / Check Manual	0	New Requests Expiring Today	0
Idle / Auth Manual	0		
Pending	11	Will Supply	8
Pending > 4 days	3	Will Supply > 4 days	0
Pending > 2 weeks	0	Will Supply > 2 weeks	0
Terminated	4		
End of lender string	0		
Other Not Supplied	0	Conditional	0
Conditional	0	Cancel Requested	0
Cancel Pending	4		
		Messages	0
Messages	0	Staff Review	0
Staff Review	0	Circulation Queue	0
Circulation Queue	0		
		Shipped	533
Shipped	21	Returned	121
Shipped > 1 week	5		
Shipped > 2 weeks	0	Renewal Requested	0
Received	98		
		Overdue Today	36
Renew Pending	0	Overdue	22
Overdue	5	Overdue > 4 weeks	5
Recalled	0		
Returned	31		


Texas Group Catalog - Search

Texas Group Catalog ▾ Search ▾ WorldCat ▾  WorldCat ([Sign in](#))



Texas Group Catalog

Search Texas Group Catalog and beyond

[Advanced Search](#) Search with  WorldCat®

Databases: WorldCat.org

Languages: [Česky](#) | [Deutsch](#) | [English](#) | [Español](#) | [Français](#) | [Italiano](#) | [Nederlands](#) | [Português](#) | [עברית](#) | [한국어](#) | [日本語](#) | [中文\(繁體\)](#) | [中文\(简体\)](#)

You: [Sign In](#) | [Register](#) | [My WorldCat](#) | [My Lists](#) | [My Watchlist](#) | [My Reviews](#) | [My Tags](#) | [My Saved Searches](#)

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WorldCat is the world's largest library catalog, helping you find library materials online.

NRE - Search

NRE

[Search](#)[Requests](#)[Work Queue](#)[User](#)[Locations](#)[Reports](#)[Batch Reruns](#)[Report a Problem](#)[Logout](#)[Help](#)[OCLC Policy
Directory](#)[Texas Resource
Sharing Project](#)

User ID
TEXASSU...

[Standard](#) [Advanced](#) [Profiles](#) [Searches](#) [Create Request](#)

Advanced Search

Use this form to conduct more advanced searches of Service Provider catalogues and other resources. To issue a simple keyword search of Service Provider catalogues use [page](#).

[Search](#) [Reset Form](#)

Choose a field name (e.g., title, any) and the word or phrase you want to search (e.g., dickens, "black holes").
Use AND, OR and AND NOT to combine or limit the search terms and make the search more specific.

Advanced Search

Field	Search Term	Operator
<input type="text" value="Title"/>	<input type="text"/>	<input type="text" value="and"/>
<input type="text" value="Author"/>	<input type="text"/>	<input type="text" value="and"/>
<input type="text" value="ISBN"/>	<input type="text"/>	

Records per page

Profile

Current Profile:

[Collections](#)

[Select all](#) [Deselect all](#)

Filter results by:

[Format\(s\)](#)

[Language\(s\)](#)

[Level\(s\)](#)

[Search](#) [Reset Form](#)



Keep your holdings current with OCLC

Keep your libraries holdings up to date when you add items or delete items in your catalog!

Update Records



- Data Sync (formerly Batchload) information, office hours, and support information [here](#).
- [Checklist for creating a WorldCat data sync collection \(Texas libraries\)](#)
- Request a Collection Manager account here:
<https://www.oclc.org/content/forms/worldwide/en/wckb-request.html>
Specify in the comments field: "Data Sync Collections for Texas Navigator Library"
- [Data Sync Collections Webinar recording](#) (1 hr 16 min 24 sec) *No password required
- [Data Sync Collections Webinar Slides](#)

Training – Self Paced

Texas Resource Sharing

Texas Navigator Group for Interlibrary Loan

[HOME](#) [CONTACT INFO](#) [HOW TO...](#) [PROMOTIONAL MATERIAL](#) [TX NAVIGATOR LIBRARIES](#) [CALENDAR OF EVENTS](#) [ABOUT](#)



How to...

Access the Texas Group Catalog

<http://texasgroup.worldcat.org/>

Put a link to the Texas Group Catalog on your website

<http://texasgroup.worldcat.org/tools/searchboxHTML>

Access the Staff Navigator Request Engine (NRE)

<https://texas.vdxhost.com/nre/>

Set up Navigator at your library

[Navigator Implementation Process](#)

Access training materials

[Navigator Training Recordings](#)

[Navigator Quick Reference](#)

ACCESS

[NRE Staff Log in](#)

[Texas Group Catalog](#)

BIBLIONIX/APOLLO LIBRARIES ONLY

[Biblionix 3rd Party Agreement](#)

[Biblionix FAQ](#)

GENERAL ILL LINKS

Training – Self Paced



Navigator

[Frequently asked questions](#)

Training



Connect with fellow
WorldShare® users in the
OCLC Community Center.

WorldCat Navigator training

OCLC is pleased to offer WorldCat Navigator training in both instructor-led and tutorial formats. Training arrangements are made directly with groups using the service.

Tutorials

Overviews for Specific Groups

- [Overview of Florida WorldCat Navigator Group](#)
- [Overview of Camino WorldCat Navigator Group](#)

Functionality Tutorials

1. [Tour of Navigator Staff interface \(NRE\)](#)
2. [Submitting Requests in Navigator](#)
3. [Definition of Work Queue Categories](#)
4. [Borrower Request Processing and Exercises](#)
5. [Lender Request Processing and Exercises](#)
6. [Request Search Demo & Exercises](#)
7. [Borrower Exceptions Processing](#)
8. [Lender Exceptions Processing](#)



Training – Scheduled

- Check the Texas Resource Sharing page

Texas Resource Sharing

Texas Navigator Group for Interlibrary Loan

[HOME](#) [CONTACT INFO](#) [HOW TO...](#) [PROMOTIONAL MATERIAL](#) [TX NAVIGATOR LIBRARIES](#) [CALENDAR OF EVENTS](#) [ABOUT](#)

Harper
Public
Library



Gonzales
Public
Library



Optimizing ILL Services in Texas Public Libraries – 10/19/17 Webinar

[Leave a reply](#)

Join Texas State Library Staff for a webinar focused on statewide resource sharing using Navigator, the consortial ILL system implemented by all accredited Texas public libraries. We will cover current usage, keeping holdings up-to-date in WorldCat, training opportunities, shipping cost solutions, and promoting the service to your patrons and communities!

Where There's a WILL, There's a Way: Optimizing ILL Services in Texas Public Libraries
Thursday – October 19, 2017
2:00 -3:00 PM CST

Register here: <https://register.gotowebinar.com/register/1873386778923400449>

****Live attendance qualifies for 1 hour Texas State Library Continuing Education credit.**

This webinar will also be recorded and available to view at a later time.

ACCESS

[NRE Staff Log in](#)
[Texas Group Catalog](#)

BIBLIONIX/APOLLO LIBRARIES ONLY

[Biblionix 3rd Party Agreement](#)
[Biblionix FAQ](#)

GENERAL ILL LINKS

[Copyright Guidelines](#)
[Share ILL](#)



Training – Scheduled

- Check the NRE log in page

NRE

Search
Login
Help
OCLC Policy
Directory
Texas Resource
Sharing Project

Login

User ID	<input type="text"/>
Password	<input type="password"/>
<input type="button" value="Login"/> <input type="button" value="Reset"/>	

[Bulletin Board:](#)

To ask a question or report an issue, please log in and use Report a Problem

Where There's a WILL, There's a Way: Optimizing ILL Services in Texas Public Libraries - Webinar

Thursday - October 19, 2017

2:00 -3:00 PM CST

[Register here.](#)

Join Texas State Library Staff for a webinar focused on statewide resource sharing using Navigator, the consortial ILL system implemented by all accredited Texas public libraries. We will cover current usage, keeping holdings up-to-date in WorldCat, training opportunities, shipping cost solutions, and promoting the service to your patrons and communities!

**Live attendance qualifies for 1 hour Texas State Library Continuing Education credit.

Contact Sara Hayes with any questions at shayes@tsl.texas.gov.



Training – Scheduled

- Upcoming Webinars on our website

The screenshot shows the homepage of the Texas State Library and Archives Commission website. The header includes the logo, navigation links (CONTACT US, VISIT US, ABOUT US), social media icons (Facebook, Twitter, YouTube, Blog), and a search bar. The main navigation bar has four categories: Archives & Reference, Services for Libraries, Talking Book Program, and Records Management. The content area is titled "Upcoming Webinars" and includes a paragraph about joining colleagues for online events, a legend for SBEC credit, and a list of links to various training resources.

TEXAS STATE LIBRARY AND ARCHIVES COMMISSION

CONTACT US | VISIT US | ABOUT US

SEARCH SITE TRAIL LIBRARY CATALOG FIND A LIBRARY ↗

Search the TSLAC Site

Archives & Reference Services for Libraries Talking Book Program Records Management

[Home](#) >
Page last modified: October 11, 2017

Upcoming Webinars

Join your colleagues for an online presentation and conversation in one of these upcoming live online events. All you need to participate is a computer, an internet connection and either the ability to hear sound through your computer or a telephone. **Unless otherwise noted, these Webinars are free of charge and open to anyone in the library field, however some Webinars may be specific to Texas.** See our [FAQ](#) for more general information about our Webinars or click the Webinar title (below) for specific information related to that Webinar. A quick registration button is provided for each Webinar for your convenience. Don't miss our [archive](#) of previously recorded events and please [email us](#) with any questions.

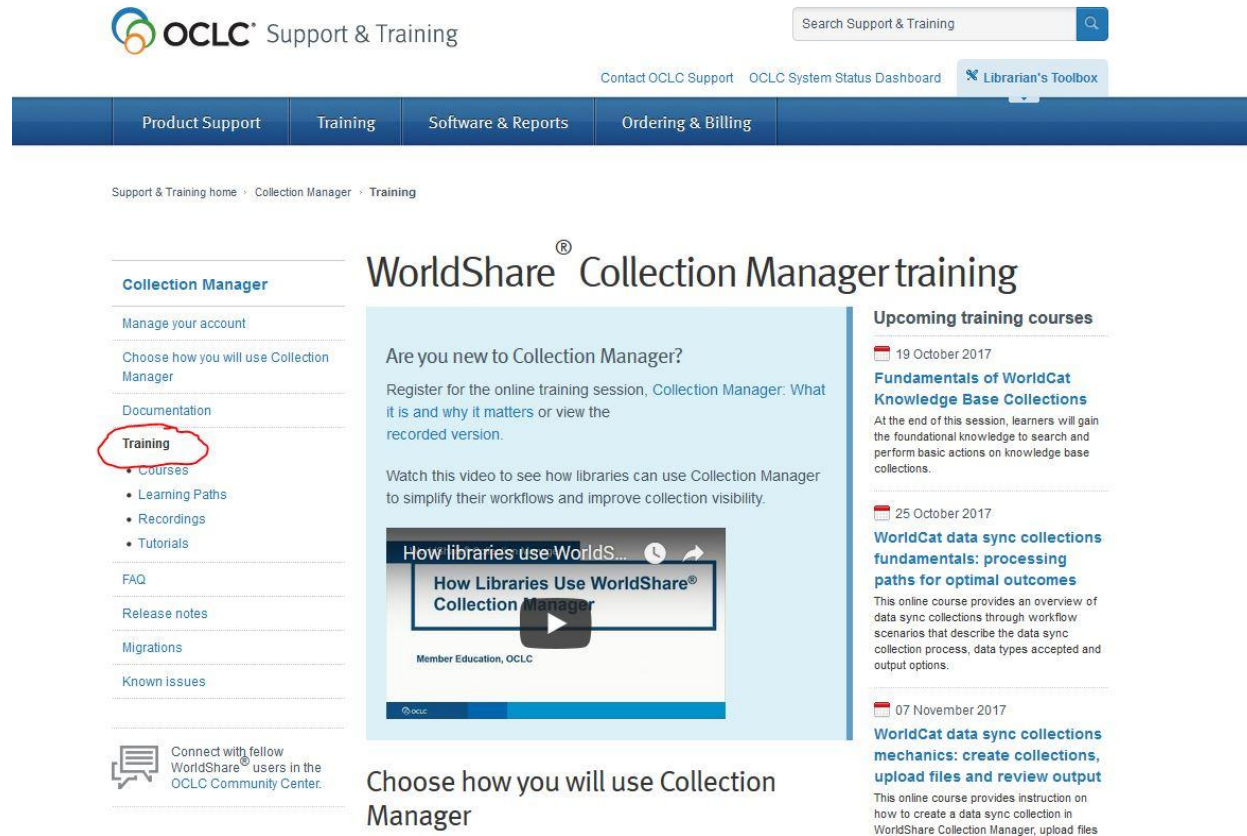
Legend:

★= These Webinars qualify for [SBEC](#) credit for school librarians, SBEC provider number #500799.

- [Home](#)
- [Advisory Committee](#)
- [Small Library Management Training](#)
- [Face to Face Workshops](#)
- [Online Courses](#)
- [WebJunction](#)
- [Webinars](#)
- [Archived Webinars](#)
- [United for Libraries](#)
- [TexQuest Training](#)
- [TexShare Training](#)
- [Calendar](#)
- [Library Science Collection](#)
- [Training Videos](#)

Training – Scheduled

- OCLC's website



The screenshot displays the OCLC Support & Training website. At the top, there is a search bar labeled "Search Support & Training" and a navigation menu with links for "Contact OCLC Support", "OCLC System Status Dashboard", and "Librarian's Toolbox". Below this is a blue navigation bar with tabs for "Product Support", "Training", "Software & Reports", and "Ordering & Billing". The "Training" tab is selected, leading to the "WorldShare® Collection Manager training" page.

The page layout includes a left sidebar with a "Collection Manager" section containing links for "Manage your account", "Choose how you will use Collection Manager", "Documentation", "Training" (highlighted with a red circle), "FAQ", "Release notes", "Migrations", and "Known issues". Below this is a link to "Connect with fellow WorldShare® users in the OCLC Community Center."

The main content area features a video titled "How Libraries Use WorldShare® Collection Manager" with a play button overlay. Text on the page includes "Are you new to Collection Manager?", "Register for the online training session, Collection Manager: What it is and why it matters or view the recorded version.", and "Watch this video to see how libraries can use Collection Manager to simplify their workflows and improve collection visibility."

On the right, the "Upcoming training courses" section lists three courses:

- 19 October 2017**
Fundamentals of WorldCat Knowledge Base Collections
At the end of this session, learners will gain the foundational knowledge to search and perform basic actions on knowledge base collections.
- 25 October 2017**
WorldCat data sync collections fundamentals: processing paths for optimal outcomes
This online course provides an overview of data sync collections through workflow scenarios that describe the data sync collection process, data types accepted and output options.
- 07 November 2017**
WorldCat data sync collections mechanics: create collections, upload files and review output
This online course provides instruction on how to create a data sync collection in WorldShare Collection Manager, upload files

At the bottom of the main content area, the text "Choose how you will use Collection Manager" is visible.



Navigator account options

- Will library staff place requests on behalf of patrons?
- Will patrons have a limit on the number of active requests at one time?
- Are there certain collections that don't circulate through ILL? (Local history, audio visual)



Creating a Local ILL Policy

- Policy Statement : Why does the library provide this service and how does it align with the library's mission statement?
- Regulations: The rules that govern the process
- Guidelines: Best practices (National/State)
- Procedures: Step-by-step instructions

Knox, Emily. *Document Delivery and Interlibrary Loan on a Shoestring*. New York: Neal-Schuman Publishers, Inc., 2010.



Create a user manual

Useful Links & information

- Log in information
- TSLAC website and contact
- Texas Resource Sharing page
- OCLC training site
- Statistics page
- Instructions on updating records
- Procedures

Quick Reference Guides- Print

Navigator Quick Reference Guides

[Creating Requests on Behalf of a Patron](#)

[Texas Barcode Prefixes](#)

[Searching for Requests in NRE](#)

[Accessing Statistics through OCLC Usage Statistics](#)

[Accessing Statistics through NRE](#)

[Shipping Items to Borrower](#)

[Receiving an Item from the Lender](#)

[Returning Borrowed Items](#)

[Checking In](#)

[Borrowing Work Queue](#)

[Lender Work Queue](#)

[Search Tips for Texas Group Catalog](#)

[Trouble Shooting](#)



ILL Costs

Texas State Library

- WorldCat FirstSearch Subscription
- Navigator subscription and holdings maintenance
- WorldShare ILL access and subscription

Libraries

- Shipping/courier costs
- Shipping supplies
- Staff time



Cost solutions - Borrowing

Charging patrons

- Local ILL policy may include a per request charge to patrons or the actual cost of shipping the item back to the lending library.
- \$3.14 = cost of a 2 lb. package USPS



Cost Solutions - Lending

ILL Lending Reimbursement Program

- Libraries are reimbursed on a per-lend basis
- No minimum lends required
- Managed through our online Grant Management System – 2 forms req.
- FY2016: \$7.07 per lend was reimbursed



Promote: On your website!

1. Embed search box for the Texas Group Catalog on the website:

A screenshot of a web search interface. At the top, it says "Search Texas Group Catalog and beyond". Below this is a search bar with a magnifying glass icon. To the right of the search bar is a dropdown menu showing "Texas Group Catalog" and a "Search" button. Below the search bar, there is a link for "Advanced Search" and text indicating "Databases: WorldCat.org". On the right side, there is a "Search with" link followed by the WorldCat logo and "WorldCat®".

2. Post the library's ILL service and policies:

Include request limits, charges, submitting a request, format restrictions, loan periods, etc.



Promote: Tell your community!





Resources - General

TSLAC Website:

General ILL Information

<https://www.tsl.texas.gov/landing/ill.html>

ILL Lending Reimbursement Program

<https://www.tsl.texas.gov/ld/ill2017>

OCLC Website:

<https://www.oclc.org/support/services/navigator.en.html>



Resources – Training Guides

Texas Resource Sharing page:

<https://www.tsl.texas.gov/texshare/newsletter/resourcesharingprojects/>

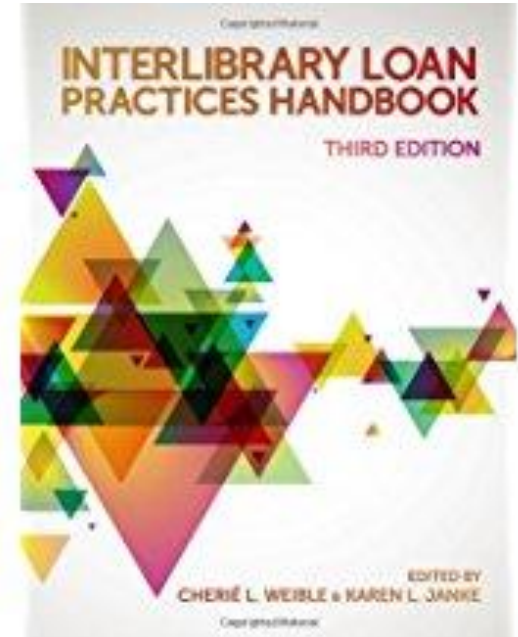
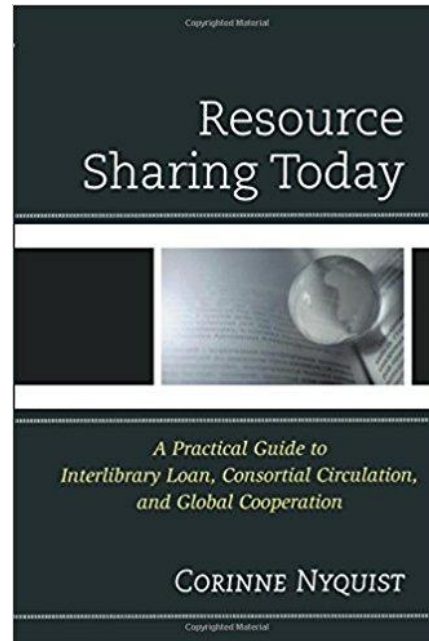
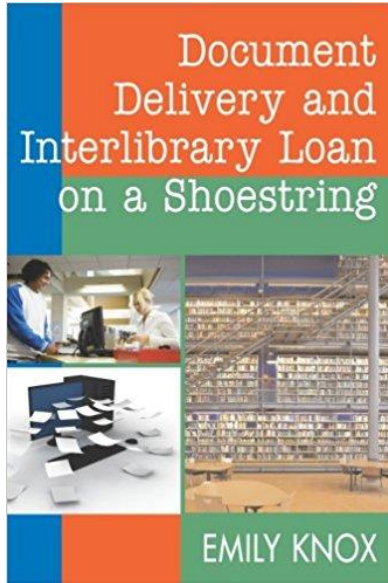
→ How to...

→ Print Resources and Documentation

→ Navigator Training Recordings

Resources – Books

Library Science Collection





Questions?

Sara Hayes, TSLAC ILL Coordinator

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OCLC

support@oclc.org